MASTER BUY PLAN DATABASE (MBPD)
USER MANUAL
Release 3.3

National Aeronautics and
Space Administration

Headquarters
Washington, D.C.

Prepared By
SAIC and NASA Code HS

TABLE OF CONTENTS

OVERVIEW

The Master Buy Plan Database is an on-line system for collecting, amending, and approving Master Buy Plan information as required by section 1807.7102 of the NASA FAR Supplement. The Procurement Officer sets policies for Center access to the system. Non-NASA personnel are not to be allowed access.

Center personnel create records on individual procurements in a table (Center Pending Table) for concurrence and release by the Center Procurement Officer (or designee). When a record is created, an email is sent to all Center personnel with Center Administrator access privileges (i.e., the Procurement Officer and designees) indicating that it is ready for review. The Center Admin may edit and release the record, or delete it. When the Center Admin releases the record, it is transferred to the HQ Pending Table, and an email alert is sent to HQ Code HS personnel with HQ Administrator access (and to the assigned HS analyst if known).

When the HS Admin reaches a decision on the record, it is transferred to either the Approved table or the Disapproved table, and an email is sent to the Center Admins and the Contracting Officer. Disapproved records include an explanation of the disapproval in the Remarks block, and are also copied back to the Center Pending Table, where they may be either edited and re-released, or deleted.

Center personnel may also edit records in the Approved table. Such an edit creates a new record in the Pending table. After HQ approval, the original record in the Approval table is updated with the edit. Emails are sent out in the same manner as is done with new records.

The system has several security features.

(1) If a user does not click any system buttons during a one-hour period, the system will log the user off. The next attempt to click a button will return the user to the login screen. Entering data does not reset this timer until the Save Changes button is clicked.
(2) The system can only be accessed from NASA computers.
(3) The system is protected by Secure Socket Layer software.
(4) Users must have a login ID and password.

SIGN IN

To use the MBPD application, a user opens his or her web browser and types the following URL: https://extranet.hq.nasa.gov/mbpd

The first screen the user will see after typing in the URL and hitting "Return" is the Sign In screen shown in Figure 1.

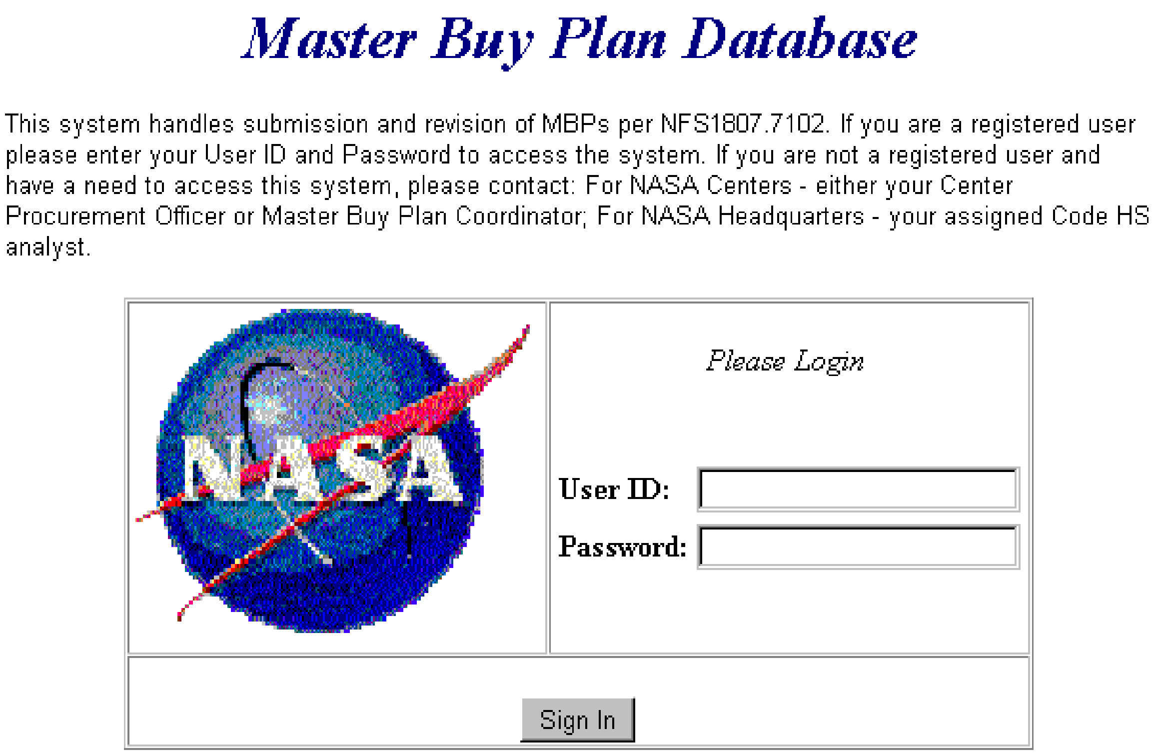


Figure 1   Master Buy Plan Sign In Screen

<u>USER NAME OR PASSWORD</u>

All users are required to enter a User ID (also known as a Login ID) and Password. The User ID is entered first then the Password (the Password is entered by tabbing over to the field or clicking the mouse in the field labeled Password).

Each user will have his/her own password. The password can have a maximum of sixteen characters. When entering into the Password field, each character will appear in the field as * for security reasons.

<u>NOTE</u>: Password is case sensitive.

<u>NOTE</u>: User names and passwords are authenticated by the system validation database that contains all the MBPD users' information and privileges.

INVALID USER NAME OR PASSWORD

In the event of a typing error or outdated password, an error message displays (Figure 2). Retype valid User ID and Password and then click the Sign In button.

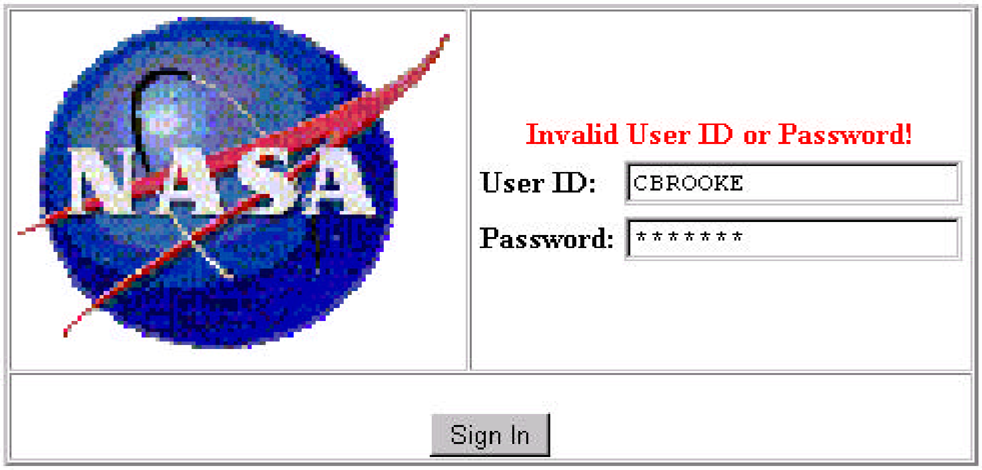


Figure 2   Invalid User Name or Password error message

NOTE: There is no limit on the number of password violations a user can have before entering a valid one.

MAIN MENU

Once a user successfully signs in to the MBPD, the Main Menu screen (Figure 3) will be displayed. From the Main Menu screen, the user can access the four functional components of the MBPD, or can exit from the system. Clicking on the **Exit button** logs you out of the system and leads you to the NASA homepage.

NOTE: Only personnel designated as system administrators have access to the Security component.

NOTE: The “Disapproved MBP” button is invisible for center personnel.

Figure 3 Main Menu Screen

LIST OF RECORDS

From the Main Menu screen, click on Master Buy Plan; the List of Records screen will appear as shown in Figure 4. By default, the List of Records screen provides the user with an overview listing of all approved records. When the users click the “Pending Records” button, the List of Records screen will show all pending records. Users may click the “Search” button to narrow down the list of the records.

In the Master Buy Plan Database, two tables are used for storing all MBP records. The Approved table holds records that have been approved by Headquarters. The Pending table holds records that the Centers and HQ have entered or edited but that have not been approved by Headquarter Administrators. Each Center has access to only its own records in both tables. Headquarters have access to both HQ records and Center's released records. The records that appear in the list are only those for which the user has access privileges. The user's access to individual cases is governed by the viewing privileges granted by the one of the System Administrators.

When a user with Center Admin or Center User access privilege adds or edits an approved record, the record will stay at Pending table. The Center Administrator can review the record and has the capability to release the record to the HQ Pending table. Only released records are visible to Headquarters. **There is an assumption that released records have been approved by the Procurement Officer or designee; therefore, records must not be released without such approval.**

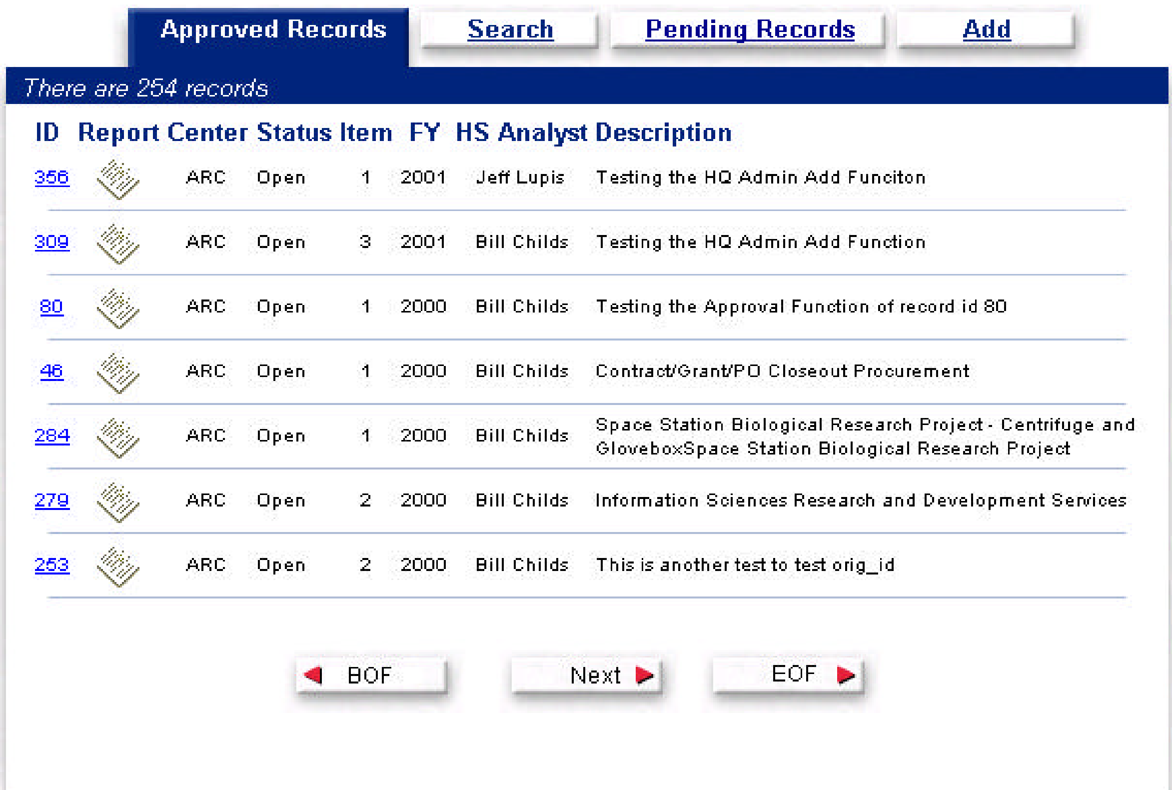


Figure 4. List of Records Screen

Click on BOF (beginning of file) to go to the first screen of records.
Click on EOF (end of file) to go to the last screen of records.
Click on Next to see the next screen of records.
Click on the ID number to see a particular record. (ID numbers are assigned automatically by the system, and have no particular meaning in themselves.)
Click the report icon to see the detailed information of the record in a printable format.

ADDING NEW MBPD RECORDS

To create a new record, click on the Add button at the top of the List of Records screen. A data entry screen appropriate for entering information regarding a new record will be displayed as shown in Figure 5. The data entry fields are described in the following sections. NOTE: A user with Read-Only access does not have the authority to add a record; therefore, the Add button is not available for them.

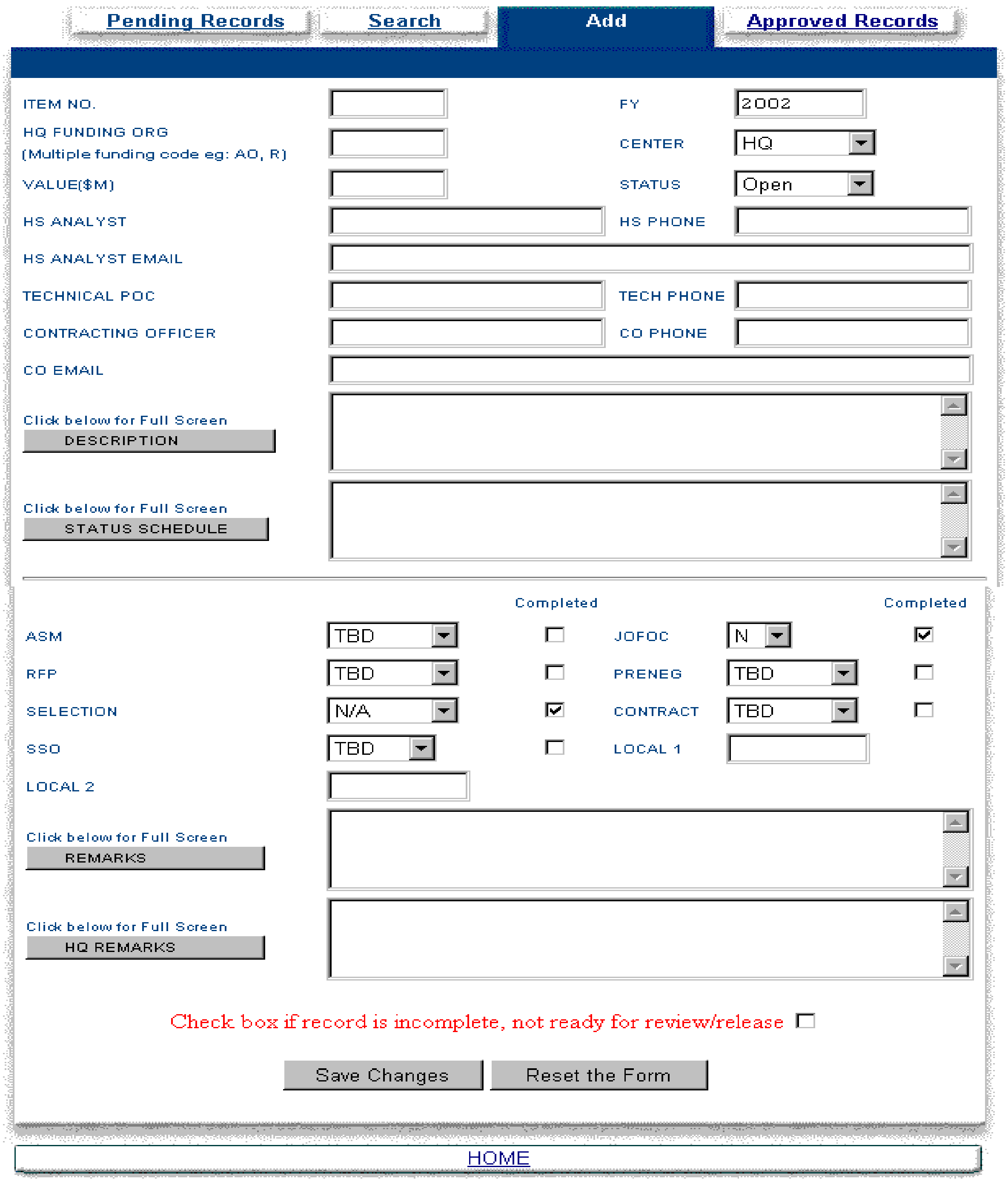


Figure 5. New Master Buy Plan Data Entry screen

ITEM NO., FY

The ITEM NO., and FY are mandatory numeric fields. The ITEM NO. Field is the Master Buy Plan sequential item no. The FY field is the Fiscal Year in which the procurement action is scheduled to be initiated.

The field will reject alphanumeric characters. A dialog box will appear: "**You must enter a numeric value."** To clear the dialog box, click on the **OK** button**.** The cursor will return to the field containing the non-numeric value.

HQ FUNDING ORG, CONTRACTING OFFICER, CO EMAIL

The HQ FUNDING ORG, CONTRACTING OFFICER, and CO EMAIL are mandatory text entry fields.

These fields will reject if left blank. When the Save button is clicked, a dialog box will appear: "**[*Field name*] can not be blanked!"** To clear the dialog box, click on the **OK** button**.** The cursor will return to the field containing the blank value.

VALUE($M)

The field VALUE is set up as a numeric field with one decimal place. This field is mandatory. It allows the user to enter the estimated dollar value (in millions) of the proposed procurement action. If a dollar range is appropriate, enter the most probable value here, and enter the range in the Remarks field.

To add an amount to the VALUE field for a new record, type in only the numeric value (no $ sign). **Example**: For the dollar amount of $17,500,000.00, type in 17.5. If the user added no decimal point, the system will fill in .0 as a default.

CENTER

The CENTER is a mandatory field that identifies the Center responsible for proposed procurement action. It is filled in automatically.

If necessary, a Headquarters analyst can reassign an item to another Center. To select a value, click on the drop-down list arrow button next to the field and highlight a value. The drop-down list will then close, and the selected name will appear in the appropriate field.

STATUS

The STATUS is a mandatory field that is accessible via a drop down list. This field is automatically assigned the value "Open" but can be changed to "In work" (if the action is not ready for release to HQ), "Completed" (if the procurement has been awarded), or "Canceled" (if the action has been canceled, withdrawn, etc.)

To select a value, click on the drop-down list arrow button next to the field and highlight a value. The drop-down list will then close, and the selected name will appear in the appropriate field.

When adding a new item, selecting the “In Work” status automatically sets the “Incomplete” checkbox (at the bottom of the form) to be checked. Selecting any other status unchecks the “Incomplete” checkbox.

HS ANALYST, HS PHONE, HS ANALYST EMAIL

The HS ANALYST, HS PHONE and HS ANALYST EMAIL are text entry fields that identify the name, phone number and email of the Headquarters analyst that has been assigned to that Master Buy Plan Item. This information will be filled in at Headquarters after the record has been released by the Center.

TECHNICAL POC, TECH PHONE

The TECHNICAL POC and TECH PHONE are text entry fields that identifies the Technical POC name and phone number that has been assigned to that Master Buy Plan Item. The user types the information in the area provided next to the labels.

DESCRIPTION

The DESCRIPTION field is a mandatory text field. Once the visible portion of the field is full, the scroll bar controls will activate to allow the user to enter or display text that extends beyond the physical size of the data entry box. The user can also click the DESCRIPTION button, which opens a full screen to enter or display a large volume of text. The user types the information in the area provided next to or under the label.

STATUS/SCHEDULE, REMARKS

The STATUS/SCHEDULE and REMARKS fields are text fields. Once the visible portion of the field is full, the scroll bar controls will activate to allow the user to enter or display text that extends beyond the physical size of the data entry box. The user can also click the STATUS/SCHEDULE or REMARKS button, which opens a full screen to enter or display a large volume of text. The user types the information in the area provided next to or under the label.

ASM, RFP, SELECTION, PRENEG, CONTRACT, SSO

The ASM, RFP, SELECTION, PRENEG, CONTRACT, SSO are fields that are accessible via a drop down list. These fields are automatically assigned the value “**TBD**” but can be updated as appropriate. Normally, the Centers will select either TBD or N/A, and Headquarters will change them when a decision has been made. The SELECTION field is currently reserved for future use, and therefore is pre-set to N/A.

To select a value, click on the drop-down list arrow button next to the field and highlight a value. The drop-down list will then close, and the selected name will appear in the appropriate field.

JOFOC

The JOFOC are field that are accessible via a drop down list. This field is automatically assigned the value "**N**" but can be changed to "**Y**" if a JOFOC will be developed.

To select a value, click on the drop-down list arrow button next to the field and highlight a value. The drop-down list will then close, and the selected name will appear in the appropriate field.

COMPLETE CHECKBOX FOR EACH PROCUREMENT MILESTONE

The COMPLETE checkbox indicates whether the associated milestone has been completed; e.g., checking the box next to "ASM" would indicate that the meeting has been held and the minutes approved. If a milestone is set to "N" or "N/A", the box will automatically be checked. Boxes may be checked, unchecked and re-checked as appropriate.

LOCAL 1, LOCAL 2

The LOCAL 1 and LOCAL 2 are text entry fields that the Centers can use for their own purposes. The user types the information in the area provided next to the labels.

INCOMPLETE RECORD

This checkbox only appears on new records. The user may check the box to indicate that the record is not ready for release to Headquarters. This partially duplicates the Status setting, but appears at the bottom of the form near the Save button as a "last chance". If the user checks this box but has a different setting in the Status block, a message warning of the inconsistency will appear when the record is saved. The user may select "OK" or "Cancel" on the warning; "OK" causes the Status to be set to "In work"; "Cancel" returns you to the document.

SAVE CHANGES

After entering all the data, click the **Save Changes** button. The record will be added to the Pending Master Buy Plan Database. A dialog box will appear: "**Your submission was successful"**. "Submission" in this case does not mean release to Headquarters. Saving also generates an email to all personnel at the user's Center that have Center Admin access, indicating that a new record has been added.

If an error is made before clicking the **Save Changes** button the user can type over it, or can clear the entire form by clicking the **Reset the Form** button. (After a record is added, the **Reset the Form** button only clears changes made since the form was added or last updated.)

EDIT/VIEW APPROVED RECORDS

From the List of Records screen (Figure 4) under the **Approved Records** tab, clicking on the ID field of a record will produce a Detail screen as shown in Figure 6. The Detail screen shows Master Buy Plan related information and allows the information to be both viewed and edited. Accessing fields and buttons may vary by the user privileges.

If an error is made during editing, the user can either write over the error, or clear all current edits by clicking on the **Reset the Form** button, which will cause the data to revert to its previous content.

After making any desired changes, the user must click on the **Save Changes** button to save the changes in the database. The record with the changes is copied into the Pending Table; the record in the Approved Table is not changed until the amendment has been approved by Headquarters. When the **Save Changes** button is clicked, a dialog box will appear: "**Your submission was successful**". This does not release a pending record to Headquarters. It does create an email that is launched to all of personnel at the user's Center that have Center Admin access. The email indicates that there has been a change, but it does not describe the change.

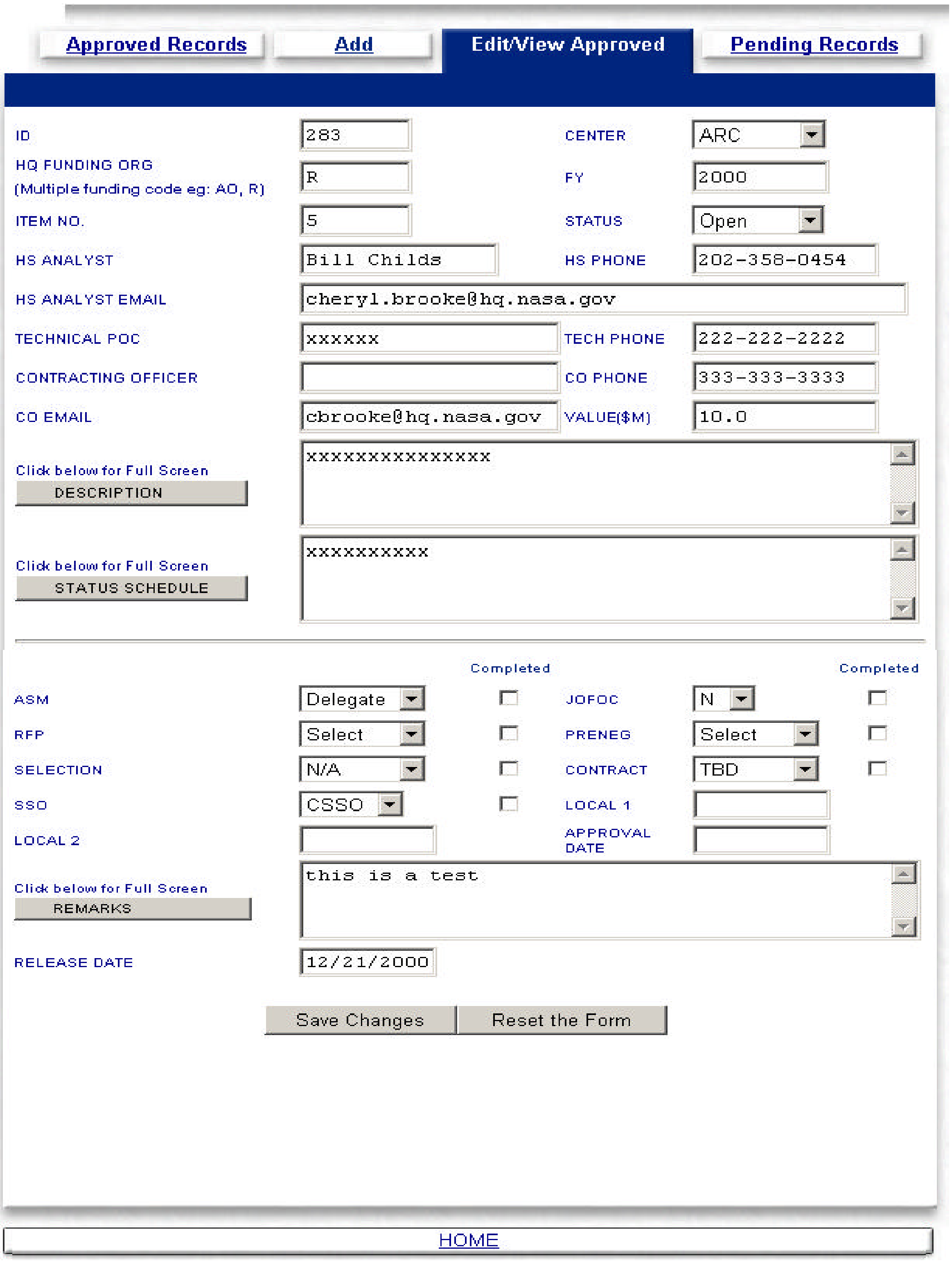


Figure 6. Edit/View Approved screen

EDIT/VIEW PENDING RECORDS

From the List of Records screen (Figure 4) under the **Pending Records** tab, clicking on the ID field of a record will produce a Detail screen as shown in Figure 7. The Detail screen shows Master Buy Plan related information and allows the information to be both viewed and edited. Accessing fields and buttons may vary by the user privileges.

The above instructions for editing and saving an approved record also apply to a pending record, except that the system does not preserve a copy of the record without the changes.

DELETE ME NOW

The **Delete Me Now** button permanently removes the pending record from the Center Pending table. This button does not appear on the Headquarters screens, or on the Edit/View Approved screen. It is only available to the Center Administrators.

DETERMINE CHANGES

The **Determine Changes** button compares the pending record with the previously approved version of the record (if any). Clicking the button brings up a display that lists the changed fields, the current content of each of those fields, and the prior content. The display includes a **Go Back** button that will return the user to the pending record.

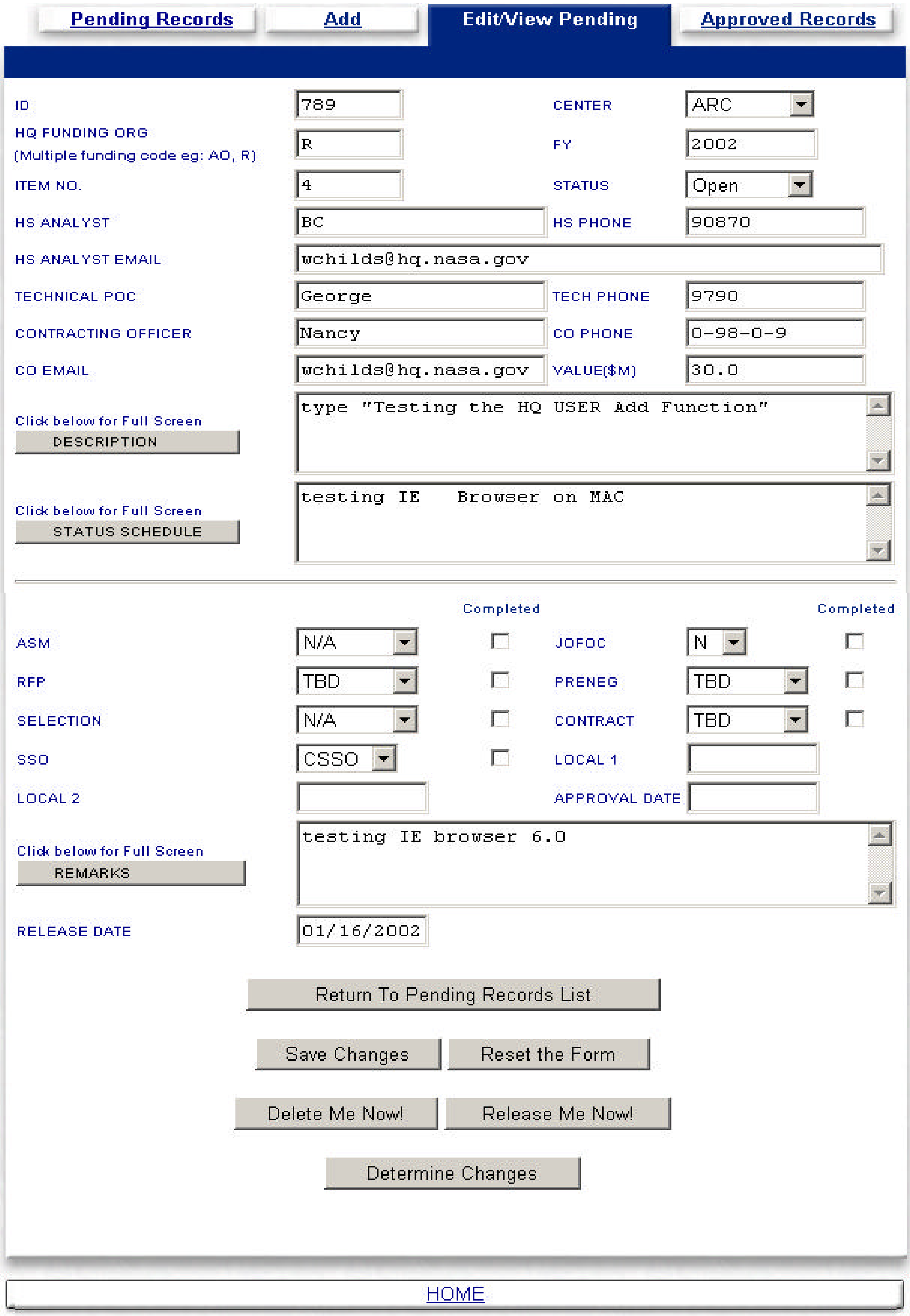


Figure 7. Edit/View Pending screen

RELEASE RECORDS TO HEADQUARTERS

From the List of Records screen (Figure 4) or the Edit/View screen (Figure 7), click the **Pending Records** toolbar option. A listing of all **Pending Records** from your Center that are stored in the Pending table will appear (Figure 8).

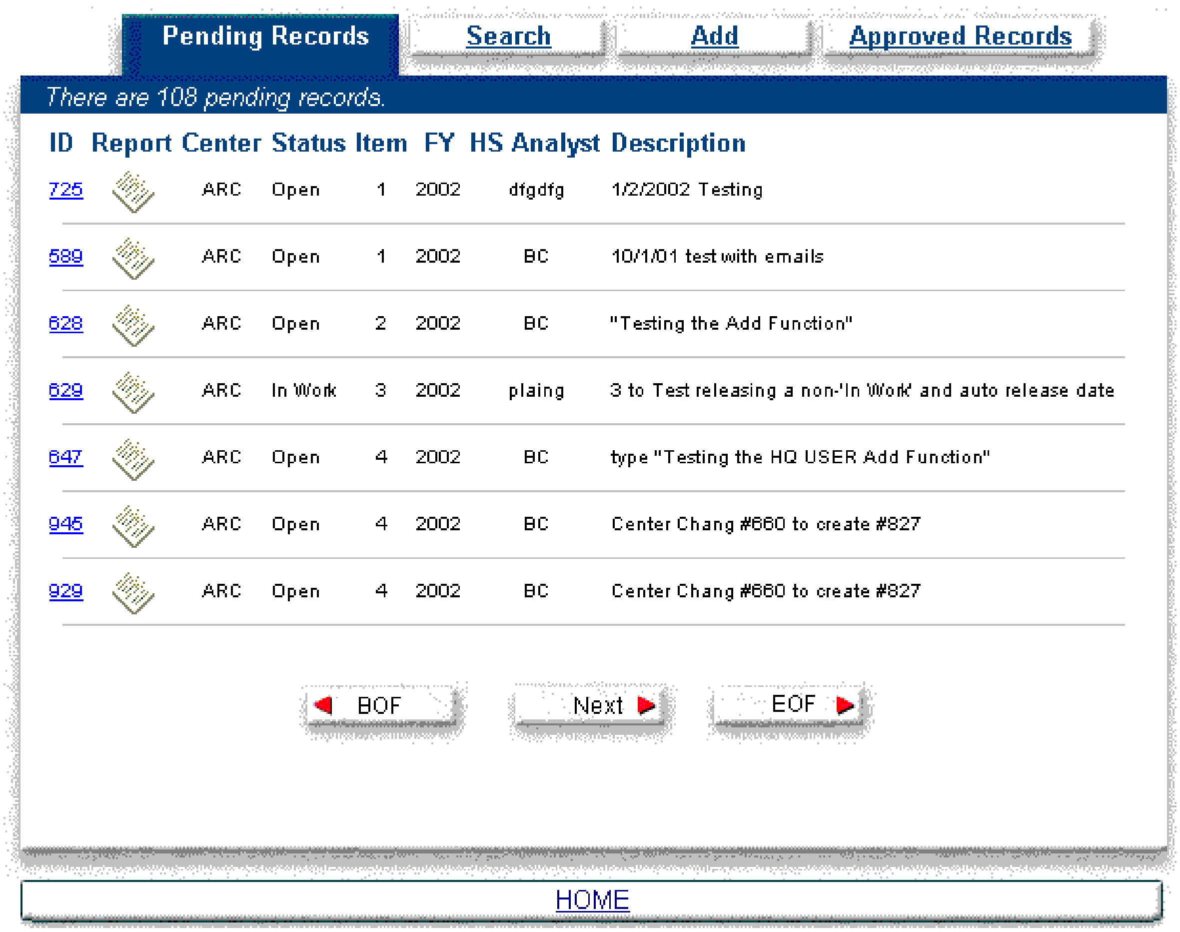


Figure 8. List of Pending Records Screen

From the list of pending records, click the desired ID to load the record for releasing. It will appear in the Edit/View Pending screen (Figure 7).

The **Release Me Now!** Button sends a copy of the record to the Headquarters Pending table, and sends an email notice to the CO, the HS analyst (if specified), and the HS system administrators. The center administrator may manually fill in the RELEASE DATE field or leave it blank. The release date should be entered in the format mm/dd/yyyy. Clicking the **Release Me Now!** button will automatically set the release date to the user's computer system date if another date isn't specified.

Center administrators may make changes in the record (such as entering a release date) before releasing it, but they must click on the **Save Changes** button to save the changes in the database. Clicking on the **Release Me Now!** button does not transmit unsaved changes, and does not save the changes. **Release must not be made without the approval of the Procurement Officer or designee. Approval need not be in writing.**

NOTE: Once a record is released, it can't be edited by center users until approved by Headquarters. If interim edits are desired, phone or email them to the cognizant Code HS analyst.

NOTE: A record with status "In Work" can't be released until another status is selected. The system will provide a warning if an attempt is made to release a record with status "In Work".

APPROVE PENDING RECORDS

The Approve function is only available to users with HQ Admin access. The **Approve Me Now!** button is not visible to other users. To prepare for approval of a pending record, go to Pending Records, and click an ID to load the desired record. The pending record will be displayed in **Edit/View Pending** screen as shown in Figure 9.

APPROVE ME NOW

The **Approve Me Now!** button moves the record to the Approved Records table, and sends an email notice to the CO, the HS analyst, and the Center administrators. The HQ administrator may manually fill in the APPROVAL DATE field or leave it blank. The approval date should be entered in the format mm/dd/yyyy. Clicking the **Approve Me Now!** button will automatically set the approval date to the user's computer system date if another date isn't specified.

HQ administrators may make changes in the record (such as entering comments or an approval date) before approving it, but they must click on the **Save Changes** button to save the changes in the database. Clicking on the **Approve Me Now!** button does not transmit unsaved changes, and does not save the changes.

DISAPPROVE ME NOW

This button is only visible to the HQ administrators. By clicking on this button, the HQ Admin disapproves a record (not the underlying procurement) and returns the record to the Center Pending table. The HQ admin should include a statement in the Remarks block, explaining the reason for the disapproval.

DETERMINE CHANGES

The **Determine Changes** button compares the pending record with the previously approved version of the record (if any). Clicking the button brings up a display that lists the changed fields, the current content of each of those fields, and the prior content. The display includes a **Go Back** button that will return the user to the pending record.

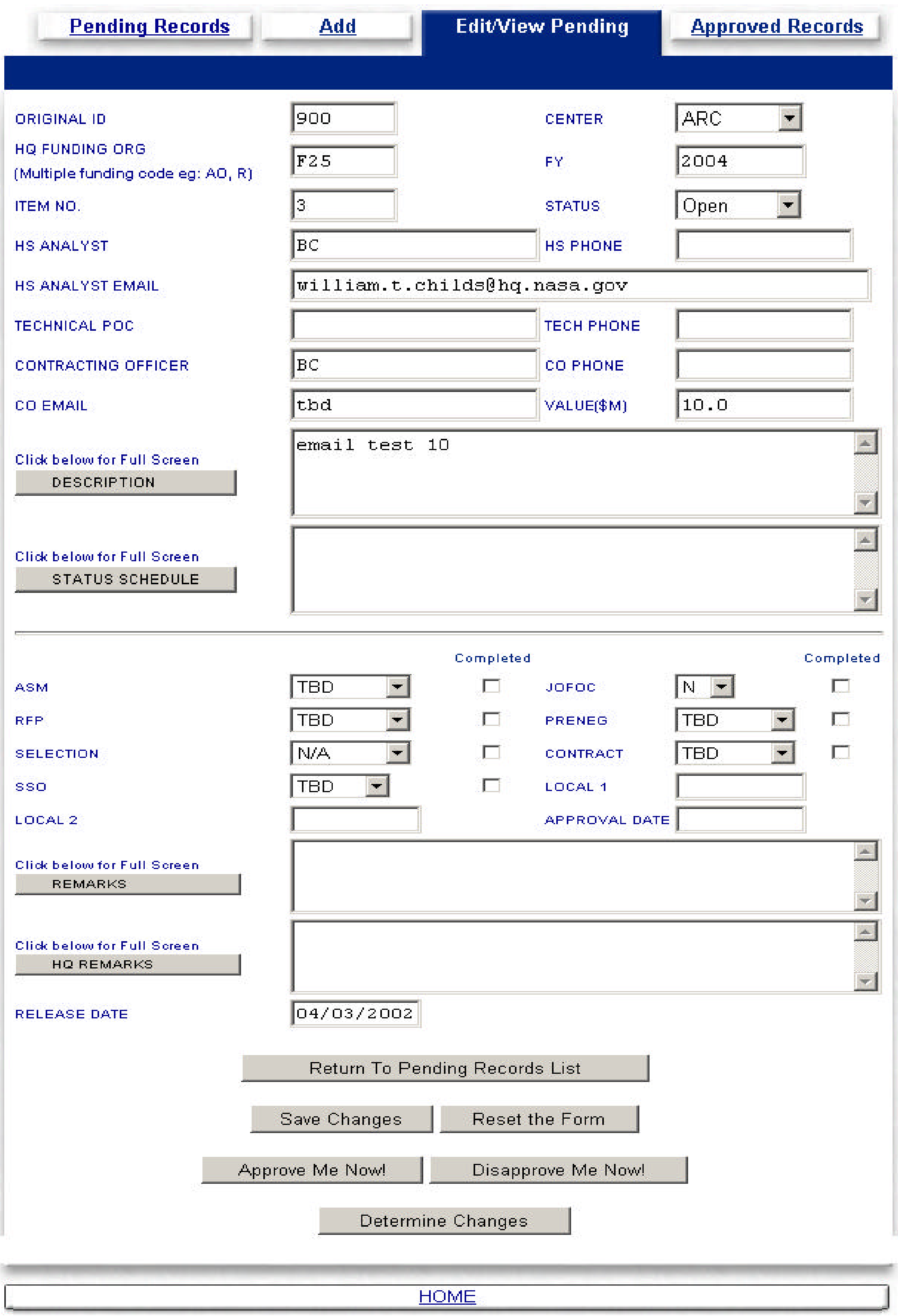


Figure 9. Edit/View Pending Screen

SEARCH

The MBPD provides users with search options so that they can narrow down the list of records. Headquarters personnel cannot access Center Pending records that have not been released. Center personnel can only access their Center's records.

To search the approved records, select **Search** from the toolbar (Figure 4). The screen for selecting the criteria will be displayed (Figure 10). The user selects specific criteria using the text box or drop-down lists provided for each field. The user can select criteria for all or none of the fields. If none of the fields are selected then all of the records are listed.

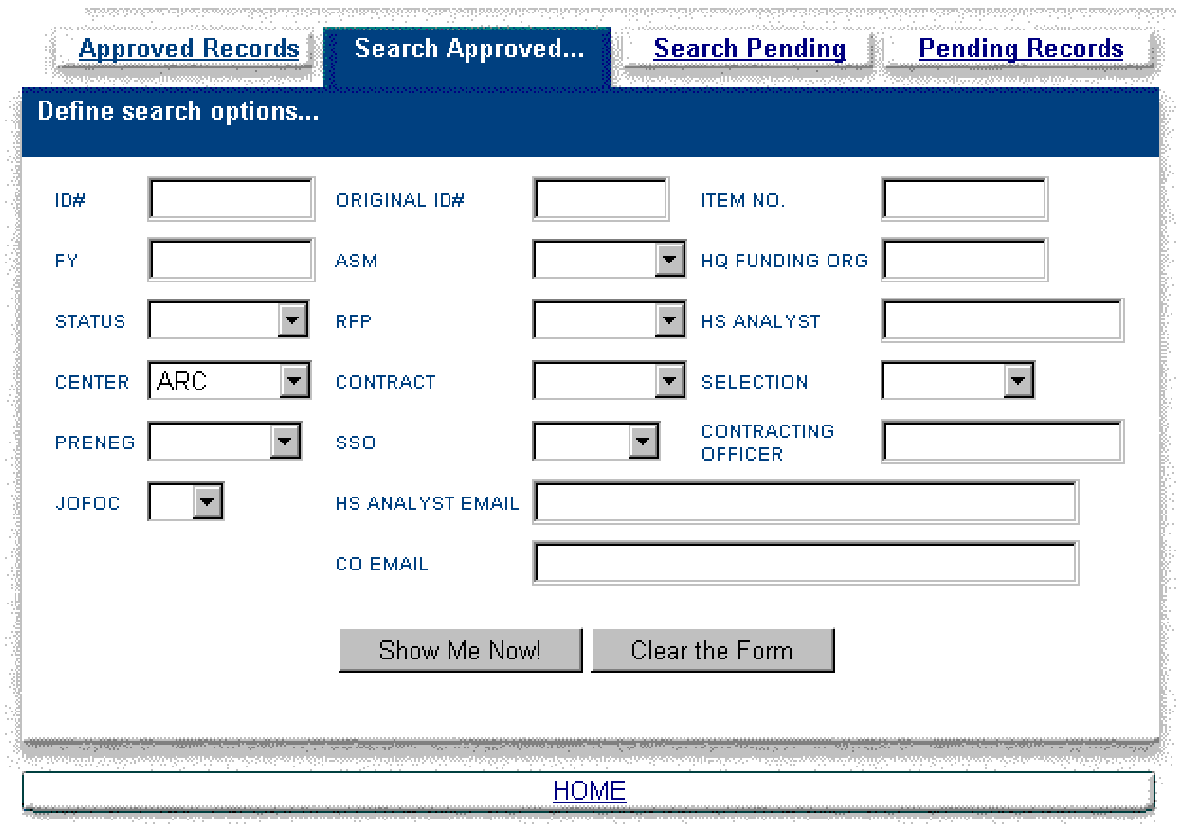


Figure 10. Search Approved Screen

To search the pending records, select **Search Pending** from the toolbar on the Search Approved screen (Figure 10). The **Search Pending** screen will appear as shown in Figure 11. The screen for selecting the criteria will be displayed and the user will follow the same instruction as searching the Approved table.

<u>NOTE:</u> The ORIGINAL ID field is not functional in the Search Approved screen.

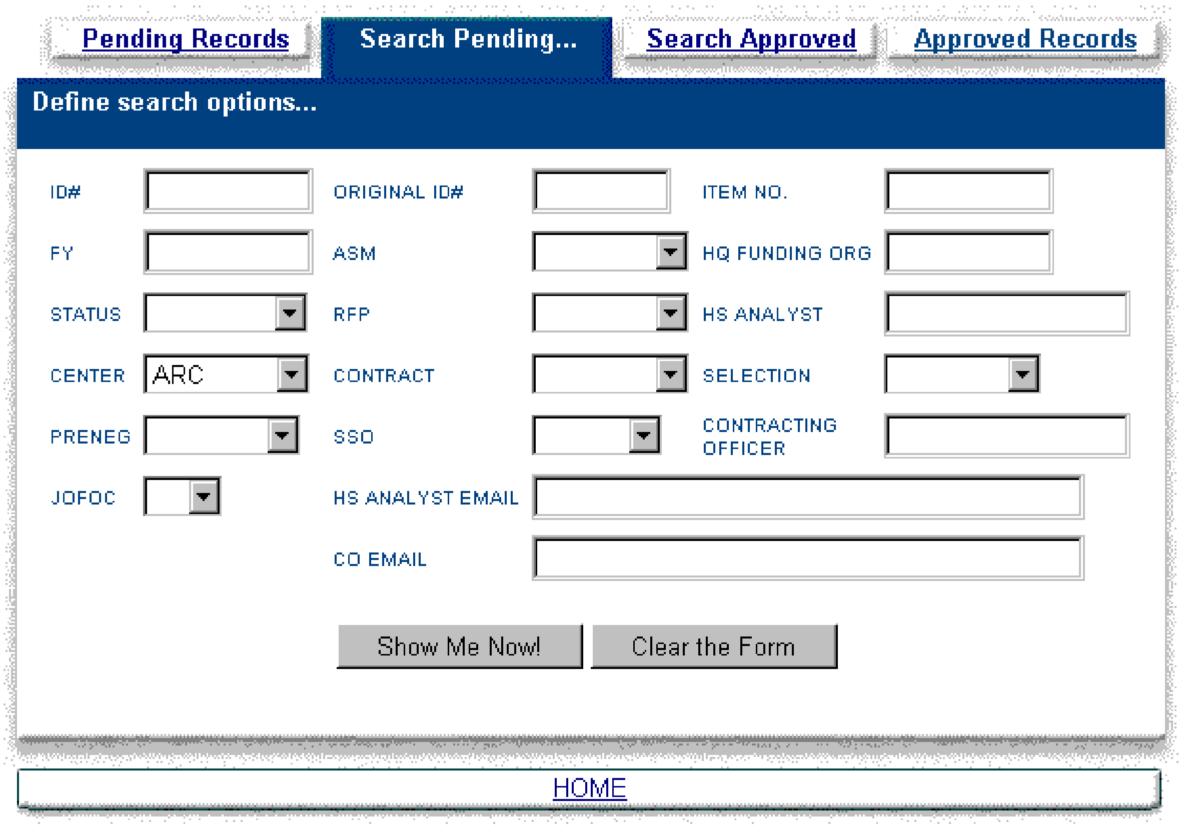


Figure 11. Search Pending Screen

REPORTS

From the Main Menu, click on the **Reports – Approved Items** button to have the reports of approved records, or the **Reports – Pending Items** button to have the reports of pending records.

<u>HQ REPORTS</u>

When the HQ User/Administrator clicks the **Reports – Approved Items** button, five HQ approval report options are displayed. (Figure 12). A similar screen is displayed when the **Report – Pending Item** button is clicked.

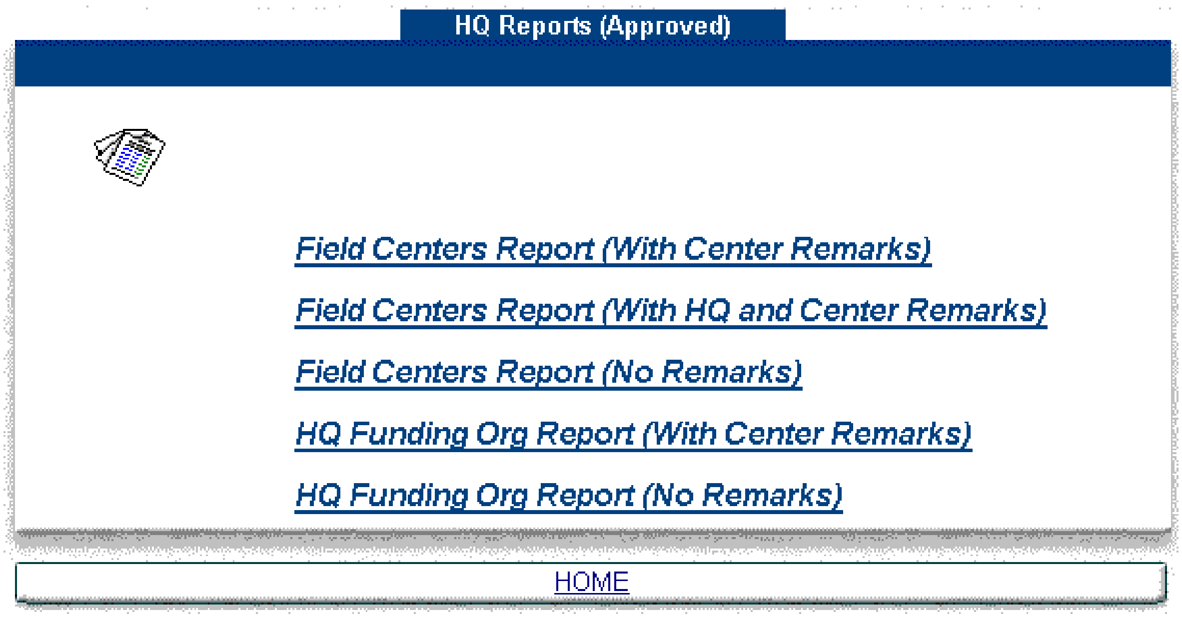


Figure 12. Approved Center Reports Screen

HQ REPORT TYPES

Of the HQ report types, the first three are to report the records by center. The user may select one or all centers to report. The differences among these three reports are in whether the report contains the center remarks and HQ remarks. The Report Criteria Screen (Figure 13) allows the user to select one or all Centers, to select the desired fiscal year, and to select whether to display all records or to exclude display of records for procurements that have already been completed.

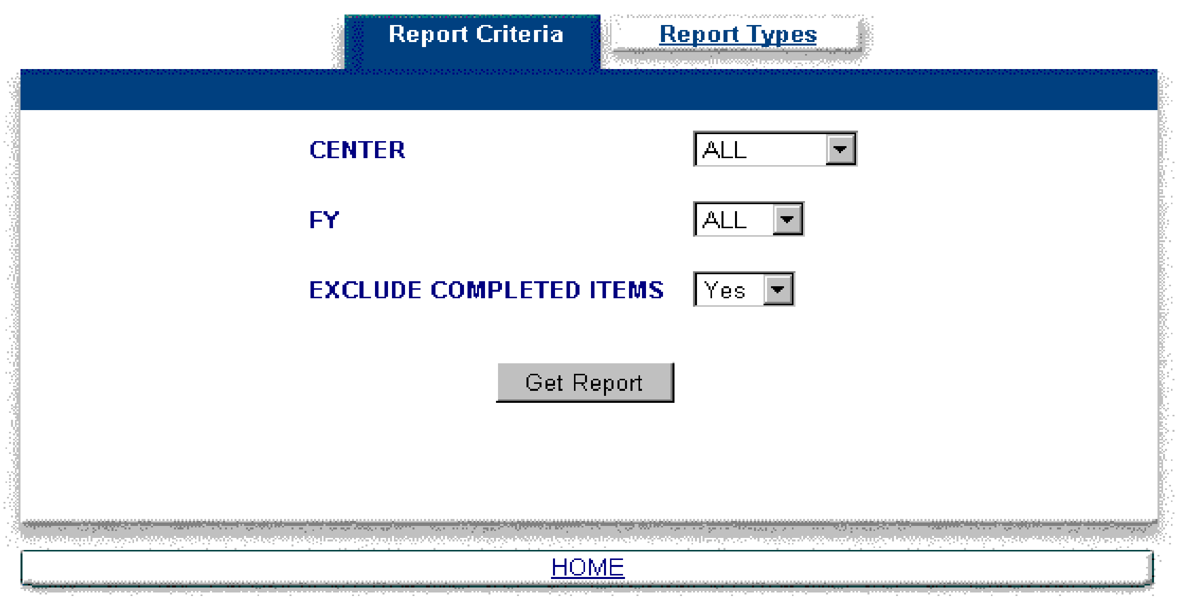


Figure 13. Report Criteria Screen

The last two report options allow the reports to be sorted by the HQ Funding Organization. The Report Criteria Screen (Figure 14) allows the user to select one or all Funding Organizations, to select the desired fiscal year, and to select whether to display all records or to exclude display of records for procurements that have already been completed.

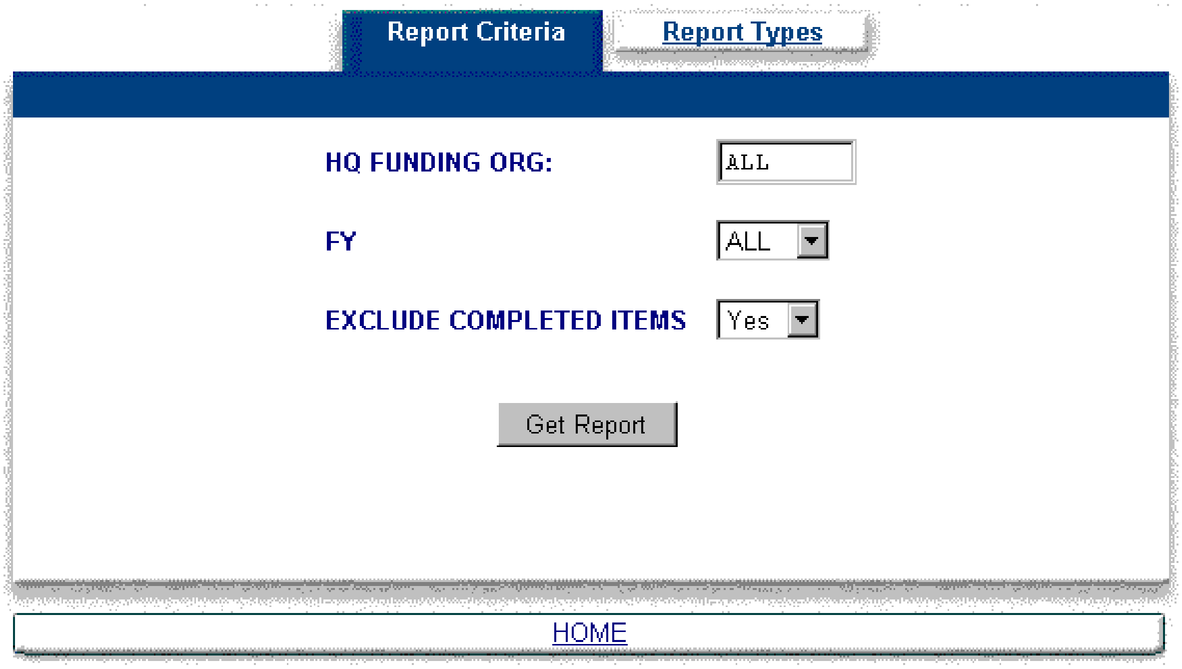


Figure 14. Report Criteria Screen

CENTER REPORTS

When the Center User/Administrator clicks the **Reports – Approved Items** or **Reports – Pending Items** button, four Center Report options are displayed (Figure 15).

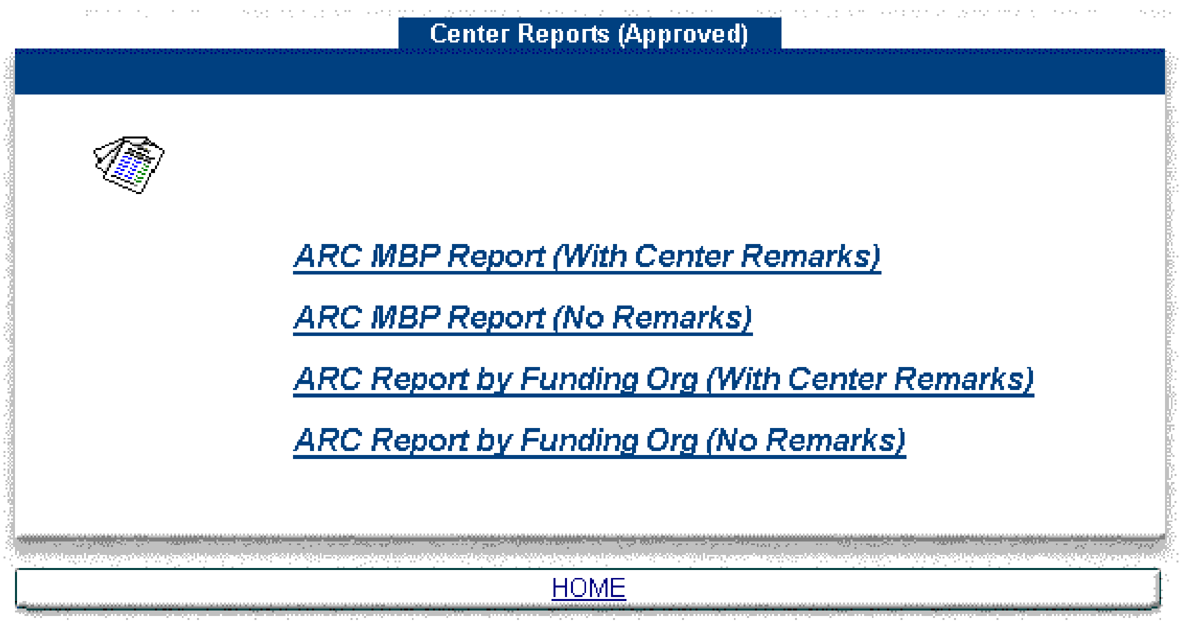


Figure 15. Approved Center Reports Screen

The first two options sort the records by year. The differences between these two reports are in whether the report contains the center remarks. The Report Criteria Screen (Figure 16) allows the user to select the desired fiscal year, and to select whether to display all records or to exclude display of records for procurements that have already been completed.

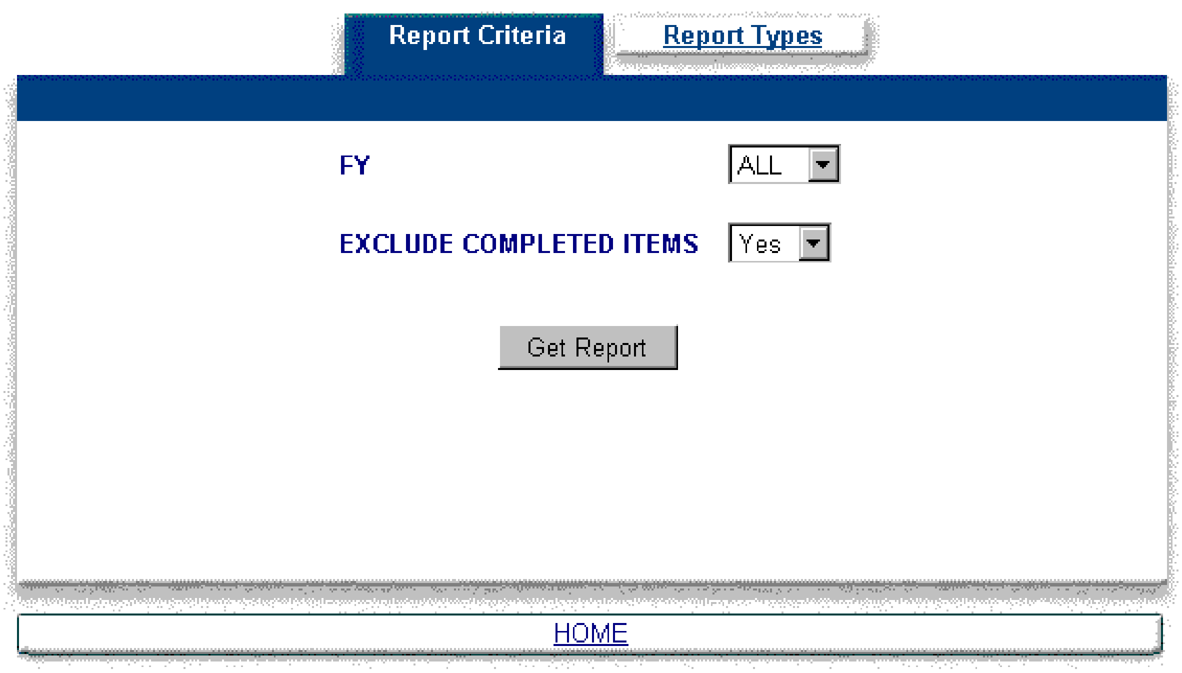


Figure 16. Center Report Criteria Screen

The last two report options allow the reports to be sorted by the HQ Funding Organization. The Report Criteria Screen (Figure 17) allows the user to select one or all Funding Organizations, to select the desired fiscal year, and to select whether to display all records or to exclude display of records for procurements that have already been completed.

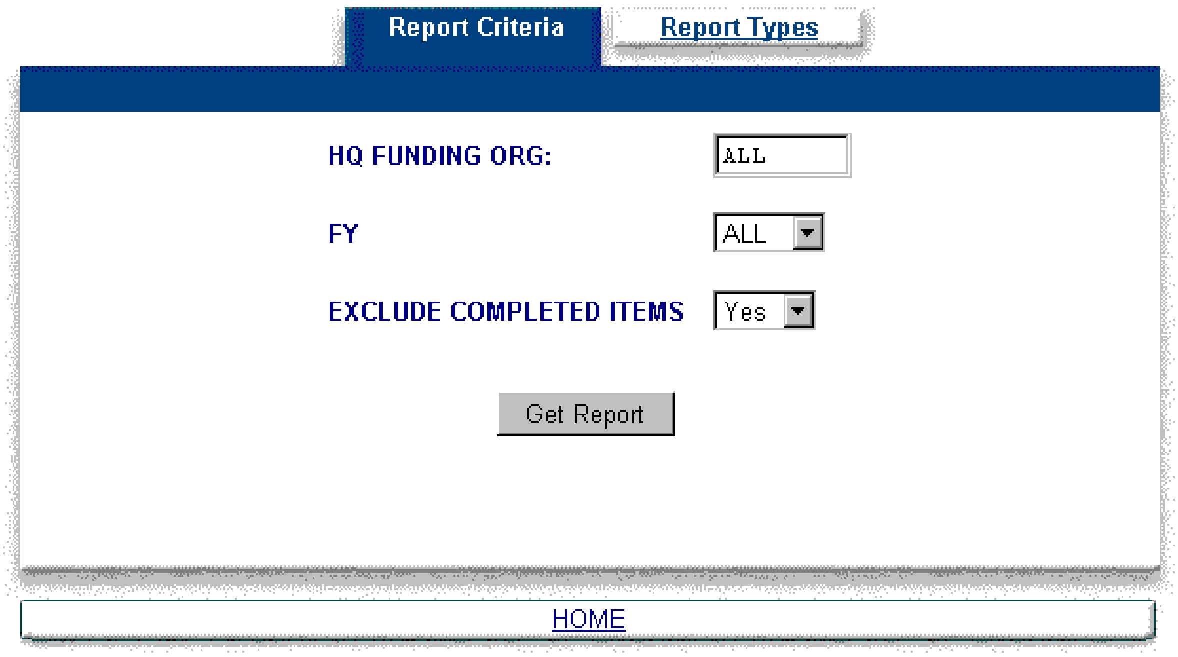


Figure 17. Center Report Criteria Screen

SINGLE RECORD REPORT

A report consisting of the entire contents of a single record can be printed as follows:

From the Main Menu, select Master Buy Plan. The List of Records screen will be displayed, listing all approved records (Figure 4).

For a report of an approved record, under the Report column click on the page symbol for the desired record. A printer-friendly version of the record will be displayed. Use your web browser's Print command to print the record. The entire contents of all fields will be printed.

Similarly, for a report of a pending record, from the List of Records screen click on Pending Records. Then click on the page symbol for the desired record, and use your browser's Print command.

SECURITY

This function allows the Headquarters and Center Administrators to grant or deny access to other users. System access is automatically limited to personnel with NASA network access, and users must have Secure Socket Layer (SSL) enabled on their computers. If you cannot access the website for MBPD, you might not have SSL; consult your local computer help office.

From the Main Menu (Figure 3), click on the **Security** button.

A Center Administrator will only see the users for the Center they are affiliated with (Figure 18).

Figure 18. Center Admin.'s User List Screen

A Center User and Center Read-Only only have access to their own user name, and only for the purpose of changing their password and email address (Figures 19, 21).

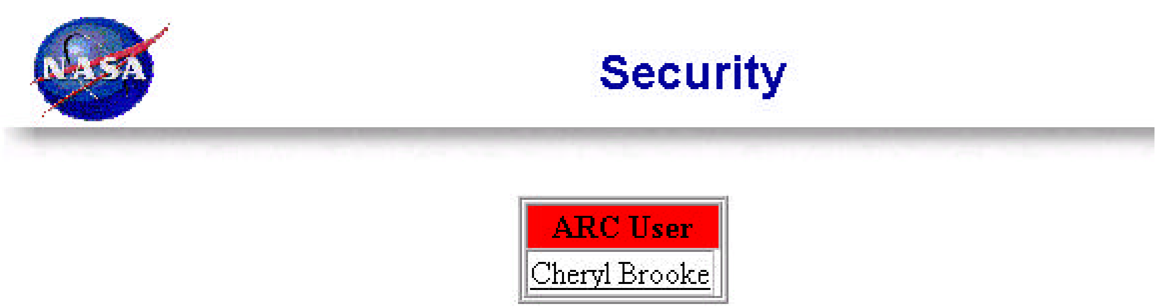


Figure 19. Center User and Center Read-Only Security Screen

Access to the system must be restricted to members of the acquisition community, because data in the Schedule or Remarks blocks might contain SEB-sensitive information. Non-NASA personnel must not be given access to the system.

The HQ Administrator is responsible for setting up Center Administrators for each center. The Center Administrator is responsible for setting and maintaining users' information and privileges. The administrator can assign a user to one of six access levels that have different privileges. These levels are called: HQ Admin, Center Admin, Center User, HQ User, Center Read-Only or HQ Read-Only. To display or set a user's access level, click on the user's name in the User List screen. A screen similar to the one shown in Figure 20 will be displayed. The privileges associated with each of the six access levels are listed below.

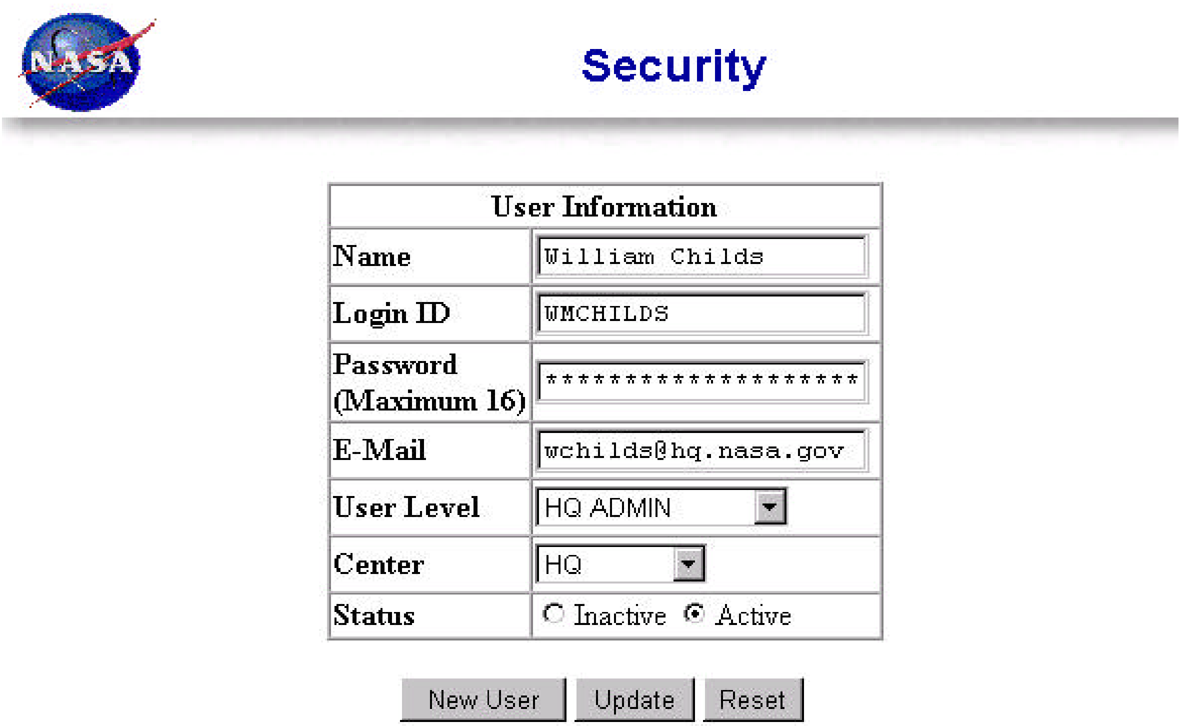
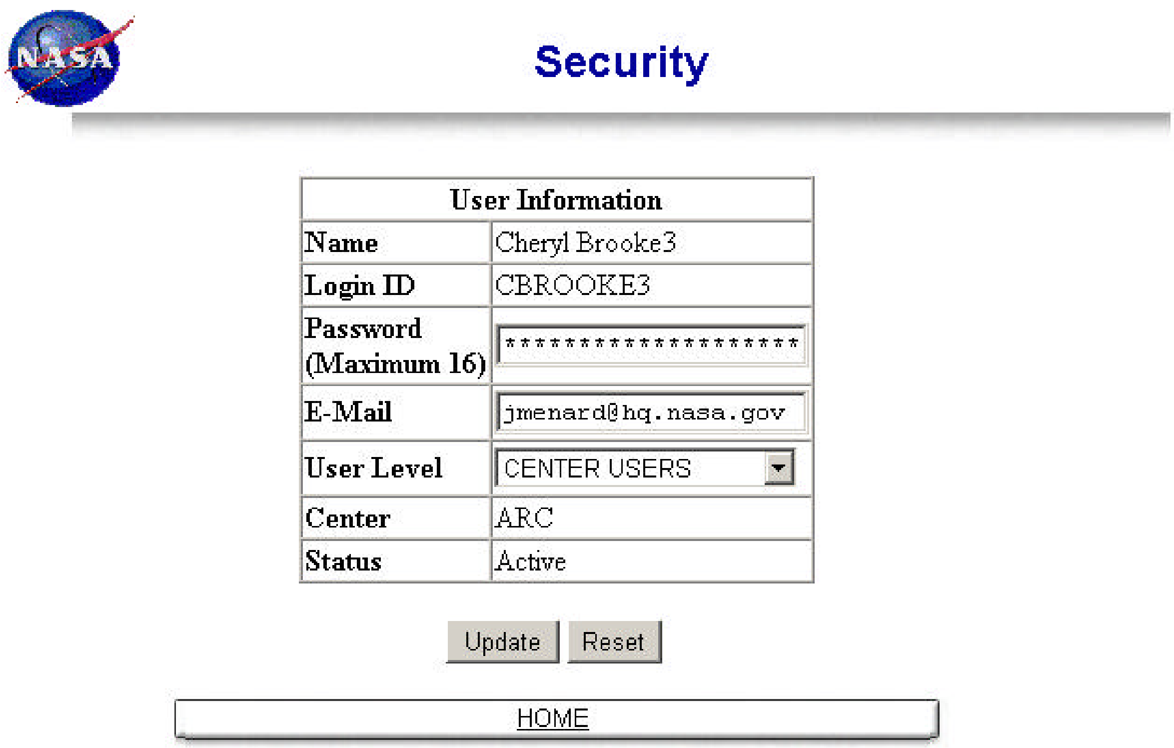


Figure 20. Screen for setting a user's access level



Security

User Information	
Name	Cheryl Brooke3
Login ID	CBROOKE3
Password (Maximum 16)	********************
E-Mail	jmenard@hq.nasa.gov
User Level	CENTER USERS
Center	ARC
Status	Active

Update Reset

HOME

Figure 21. Screen for changing only password and email address

NOTE: Only one access level can be assigned to each user.

CENTER READ-ONLY

- This user can view all records from their Center in the Approved or Pending table.
- This user can search for their Center's records in the Approved or Pending table.

HQ READ-ONLY

- This user can view all records in the Approved or HQ Pending table.
- This user can search all records in the Approved or HQ Pending table.

CENTER USERS

- This user can add a record to the Center Pending table.
- This user can edit records in the Center Pending table.
- This user can draft edit an Approved record
- This user can view all records from their Center in the Approved or Pending table.
- This user can search for their Center's records in the Approved or Pending table.

HQ USERS

- This user can add a record to the HQ Pending table.

- This user can edit records in the HQ Pending table.
- This user can view all records in the Approved or HQ Pending table.
- This user can search all records in the Approved or HQ Pending table.

CENTER ADMIN

- This user can add a record to the Center Pending table.
- This user can edit records in the Center Pending table.
- This user can draft edit an Approved record
- This user can release a record from the Center Pending table to the HQ Pending table.
- This user can view all records from his/her Center in the Approved or Pending table.
- This user can search for his/her Center's records in the Approved or Center Pending table.
- This user can set up a new user for his/her Center with Center Admin, Center User or Center Read-Only access.

HQ ADMIN – This is the highest level of access.

- This user can Add a record to the Approved table.
- This user can Edit all fields.
- This user can view all records in the Approved table.
- This user can view all records in the HQ Pending table.
- This user can view all records in the Disapproved table.
- This user can search all records in the Approved table.
- This user can search all records in the HQ Pending table.
- This user can search all records in the Disapproved table.
- This user can set up a new HQ User, HQ Read-Only, Center Admin, Center User or Center Read-Only.
- This user can approve a record.
- This user can disapprove a record.

ADDING NEW USERS

This function is only accessible by Headquarters and Center Administrators. To add a new user to the MBPD system, click on the New User button (Figure 20). A new screen will appear that contains appropriate blank fields for the Administrator to type in the information (Figure 22).

Security

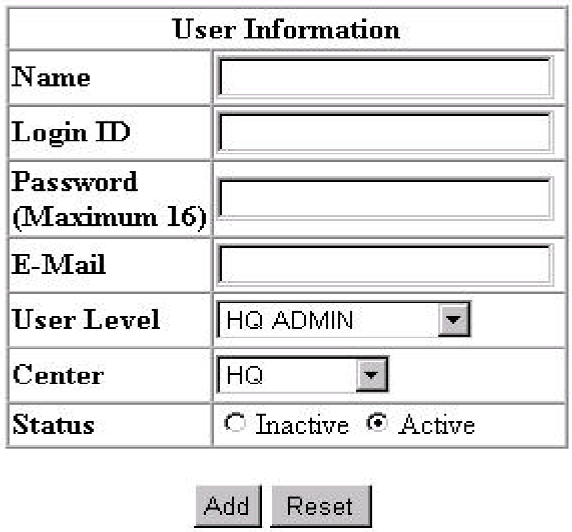


Figure 22. New User Screen

<u>Name</u>

Type in the user's first and last names into the Name field.

<u>Login ID</u>

The Login ID is also the User ID. It is a mandatory field.
The Login ID has to have exactly eight characters.
The Login ID cannot contain blanks.
The Login ID must be all capital letters. All lower-case letters will be automatically converted to caps after the user has been added.

<u>Password</u>

The Password is a mandatory field.
The Password has a minimum of eight characters.
The Password has a maximum of sixteen characters.
The Password must use 3 of these four types of characters: uppercase, lowercase, numbers, special characters (e.g., JOHNdoe1).
The Password cannot contain blanks.
The Password cannot be the same as the Login ID.
Each character in the passwords will appear as a * on the screen for security reasons.

<u>E-Mail</u>

Type in the user's e-mail address into the E-Mail field. An invalid email address will prevent the user from receiving or sending emails successfully.

User Level

Select the appropriate User Level from the drop-down list.

Center

Select the appropriate Center from the drop-down list.

Status

Select Active to give the user access to the system.

ADD Button

After all the information has been filled in, click on the **Add button** to add the user to the system.

UPDATING USER INFORMATION

When a user's information or access needs to be changed, click on the user's name from the User List (Figures 18, 19). The User Information screen will appear (Figures 20, 21). Type over the information to be changed, and click on the **Update button**.

If the user will no longer be accessing the system, change the **Status** to Inactive. This will cause the user to be rejected when trying to log in to the system.

NOTE: Personnel with Center User or Center Read-Only access only have authorization to change their password and e-mail. The password and e-mail fields are the only editable fields (Figure 21).